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**Docufide Sender:**
**Student Rosters**

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# Student Rosters

Using the Student Roster interface, you can import full student roster of current students (grades 9-12); you also will have the opportunity to import alumni records. When you import your student roster, you receive many benefits to manage your students' interaction with Parchment. For example, you will be able to run reports to discover which students have registered, and which students you need to contact to complete their registration.

Once you import the roster, Parchment will generate a unique Parchment Registration Code (also known as a PIN) for each current student in the roster. At the time the school uploads the roster, Parchment will mail, on behalf of the school, the registration code to the parents of each student at the address listed in the roster for that student. The registration letter contains instructions to students to create their account at parchment.com and how to use the Parchment Registration Code to associate their high school with their Parchment account.

This guide will describe the student roster feature including steps to:
- Prepare an import file.
- Import a student roster.
- Manage student registrations.
- Generate a mail merge file or PDF lists of Parchment Registration Codes.

## Prepare Import File
Import files can be prepared by exporting data from your school's Student Information System (SIS) or by typing the information in a database or spreadsheet program.

### Exporting SIS File
If you are exporting your text file from your SIS, you must complete the following steps:

1.  Select the records you want to export (for example the all current students in grades 9-12).
2.  Select the fields to include in your export file. The export file must contain the following fields:
    a.  Student ID - a unique Student ID for each student across all grades; the Student ID will be used to match an existing record in the Student Roster when importing an updated file.
    b.  Student Name (First and Last)
    c.  Date of Birth
    d.  Graduation or Leave Year
    e.  Address (full physical address)
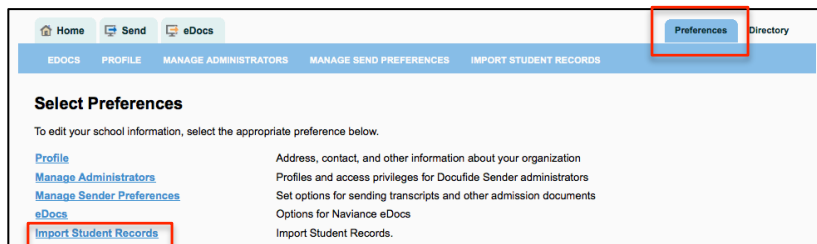3.  Save the file to your hard drive in a CSV (comma separated) or tab-delineated text format.

Please Note: Parchment cannot provide specific steps for exporting a file from your SIS, but can assist with general questions.

### Creating an Import File
If you are creating your text file in a database or spreadsheet program, you must complete the following steps:

1.  Place each field in a separate column and each record in a separate row.

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2. The file must contain the following fields:
   a. Student ID - a unique Student ID for each student across all grades; the Student ID will be used to match an existing record in the Student Roster when importing an updated file.
   b. Student Name (First and Last)
   c. Date of Birth
   d. Graduation or Leave Year
   e. Address (full physical address)
3. Save the field to your hard drive in a CSV (comma separated) or tab-delineated text format.

Below is a table of all fields that can be included in the file.

| Field | Required | Description |
|---|---|---|
| Student First Name | Yes | Student's first name. |
| Student Middle Name | No | Student's middle name. |
| Student Last Name | Yes | Student's last name. |
| Suffix | No | Student's suffix (such as Jr, II, III, etc) |
| Date of Birth | Yes | Student's date of birth. |
| Graduation/Leave Year | Yes | Four-digit year of graduation. |
| Gender | No | Student's gender specified as Male or Female. |
| Current Grade Level | No | The student's current grade level such as 9th, 10th, 11th, 12th, Graduated, Left without Graduating. |
| Address1 | Yes | First line of the student's address. |
| Address2 | No | Second line of the student's address. |
| City | Yes | City of the student's address. |
| State | Yes | State or province of the student's address. |
| Postal Code | Yes | Postal code of the student's address. |
| Phone Number | No | Student's phone number. |
| Email Address | No | Student's email address. |
| Parent/Guardian First Name | No | Parent or guardian's first name. |
| Parent/Guardian Last Name | No | Parent or guardian's last name. |
| Parent/Guardian Address1 | No | First line of the parent or guardian's address. |
| Parent/Guardian Address2 | No | Second line of the parent or guardian's address. |
| Parent/Guardian City | No | City of the parent or guardian's address. |
| Parent/Guardian State | No | State or province of the parent or guardian's address. |
| Parent/Guardian Postal Code | No | Postal code of the parent or guardian's address. |
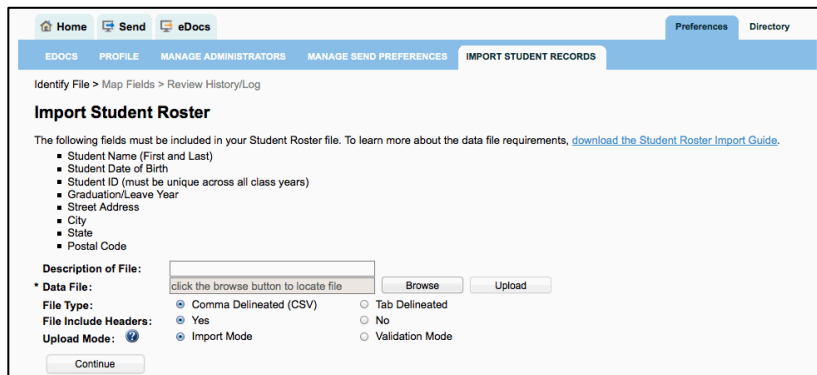
# Import Student Roster

Once you have generated your import file, you can use the simple Docufide interface to test and import your student roster file.

## *Validate Import File*



**Step 1: Access Import Student Roster Page**

Select the 'Preferences' link header bar and then the 'Import Roster Records' link.

Note: An administrator must have Site Admin permission for the Docufide Sender module to access the Import Roster Records page.



**Step 2: Upload the Import File**

Upload the import file. You can provide an optional description for the file to make it easier to identify the import on the History/Log page.

Other settings to note include:

- File Type – indicate whether the file is a CSV or Tab Delineated file.
- File Include Headers – indicate wither the first row of the file contains column headings or actual data that should be imported.
- Upload Mode – select 'Validation Mode' to verify the file without importing any records.

## Step 3: Map Fields
Map the fields in your file to the fields in the Docufide database. Docufide will attempt to automatically map the fields, but you can correct the mapping as needed.

If you select the 'Save Mapping' checkbox, the next time you import a file the system will 'remember' the field mapping.



## Step 4: Review Validation Report
Review the Validation Report to identify any errors in your file. The validation report will identify the row number and error so that you can correct the errors and re-import the file.

You can export the validation report to an Excel spreadsheet to assist with error resolution.

If there are errors in your file, correct the effected files and repeat steps 1-4 until you have no errors.

If you file is error free, click the Import File button and your validated file will be imported.

## Step 5: Review Import History
The Import Log provides a full history of all roster imports including:

- Date imported
- Administrator that completed the import
- Link to the imported data file
- Optional description of the file
- Import mode (e.g. import or validation)
- Link to view the import log, including any errors
- Number of records included in the import

## *Import Roster File*



## Step 1: Access Import Student Roster Page
Select the 'Preferences' link header bar and then the 'Import Roster Records' link.

Note: An administrator must have Site Admin permission for the Docufide Sender module to access the Import Roster Records page.



## Step 2: Upload the Import File
Upload the import file. You can provide an optional description for the file to make it easier to identify the import on the History/Log page.

Other settings to note include:
- File Type – indicate whether the file is a CSV or Tab Delineated file.
- File Include Headers – indicate wither the first row of the file contains column headings or actual data that should be imported.
- Upload Mode – select 'Import Mode' to import the file without first validating it. If there are any errors in the file, Docufide will identify the errors and skip the record when completing the upload.

### Step 3: Map Fields

Map the fields in your file to the fields in the Docufide database. Docufide will attempt to automatically map the fields, but you can correct the mapping as needed.

If you select the 'Save Mapping' checkbox, the next time you import a file the system will 'remember' the field mapping.



### Step 4: Review Import History

The Import Log provides a full history of all roster imports including:

- Date imported
- Administrator that completed the import
- Link to the imported data file
- Optional description of the file
- Import mode (e.g. import or validation)
- Link to view the import log, including any errors
- Number of records included in the import

## Undo Roster Import

The 'Undo Import' function allows you to immediately undo an import if you uploaded an incorrect file. You will not be able to undo an import once at least once student included in the file has successfully registered with Parchment.



**Step 1: Review Import History**
On the Import History/Log page, select the 'undo' link for the import you want to delete.



**Step 2: Confirm Undo**
On the 'Undo Student Record Import' page, click the Continue to undo the import. You cannot reverse the operation once you click Continue.

If you do not want to cancel the undo, click the Cancel button.

## Manage Student Registrations

Once you have imported your student roster, you can manage student registrations through the Manage Student page. From this page you can complete the following functions:

- Review student registrations to determine which students have not yet registered with Parchment.
- Add individual student roster records if a student enrolls after the import was completed.
- Edit student roster records.

# Review Student Registrations



## Step 1: Locate Student Records
To view the student roster records and registrations, select the 'Send' tab in the header and 'Manage Students' link in the sub-header.

Note: An administrator must have Sender permissions to access the Manage Students page.

## Step 2: Search for Student Records
Select the search criteria to locate your student records and click 'Search' to return a list of student records matching your criteria.

Notes:
- If a student has registers with Parchment using their Parchment Registration Code, the code will no longer be displayed in the roster. Instead, a 'pin' icon will display indicating that the student registered using their registration code.
- If a student has not yet registered, or did not register suing their Parchment Registration Code, the code will display in the roster. To facilitate registrations, an administrator can use this page to lookup a registration code and provide it to a student after verifying their identity (preferably by requiring the student to show a picture ID).

## Add Student Record
Because students may enroll midterm, you can manually enter student records at any time on the Manage Students page. When a record is manually entered, the system auto-generates a registration code for the student, but Parchment does not send a registration letter to the student. You will need to provide the registration code directly to the student.

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**Step 1: Add Student Record**
On the Manage Students page, click the 'Add Student' tab.

Complete at least the required fields to add the student record.

Note: The Student ID entered on this page must be a unique ID that allows you to update the record through the import.

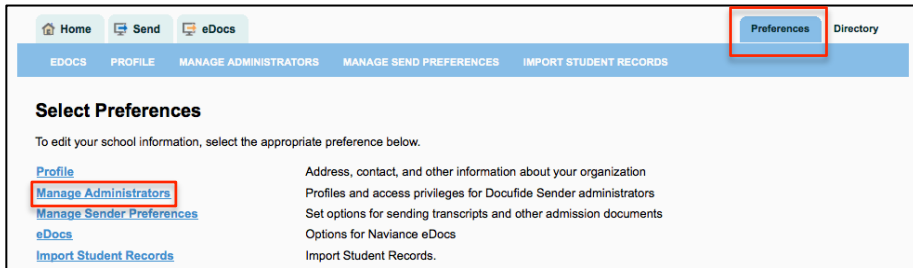## Manage PIN Settings
On the PIN Settings page you can:
- Generate a mail merge file or PDF with the Parchment Registrations Codes.
- Upload a logo to be included on the registration letter sent by Parchment.

Note: An administrator must have Site Admin permissions for Docufide Sender to access the Manage PIN Settings page.

### *Generate Mail Merge File or PDF of Parchment Registration Codes*
To assist with distributing Parchment Registration Codes (or PINs), you can generate two types of files:
- Generate a mail merge file to print and mail the registration codes to your students.
- Print a PDF version of the registration codes to distribute the codes in person (such as during a back to school event or during home room).

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**Step 1: Access PIN Settings Page**
Select the 'Preferences' link header bar and then the 'Mange Sender Preferences link.

On the Mange Sender Preferences page select the 'PIN Settings' tab.



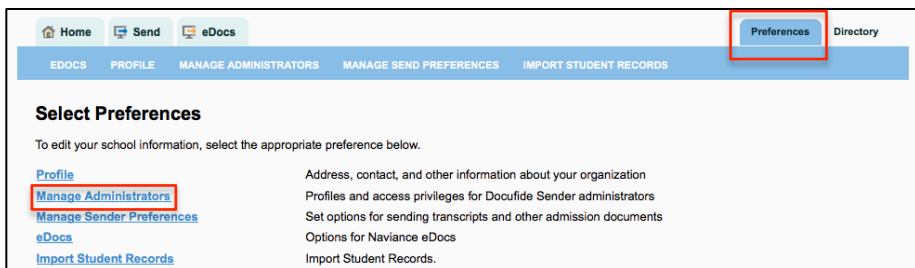**Step 2: Generate a Mail Merge File or PDF**
Select the class years you want to include in the file. The available class years include the current student body only because registration codes are generated for current students only.

Select the File Format:
- Mail Merge File – generates a CSV file that can be used to create a mail merge document in Word.
- PDF File – PDF of all registration codes that can be printed.

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## *Upload Logo for Registration Letter*

Parchment sends a registration letter to all current students providing instructions to register with the Parchment, and includes the student's unique Parchment Registration Code. Because this letter is sent by Parchment on behalf of your school, Parchment encourages you to upload a logo that can be included on the letter.



**Step 1: Access PIN Settings Page**
Select the 'Preferences' link header bar and then the 'Mange Sender Preferences link.

On the Mange Sender Preferences page select the 'PIN Settings' tab.



**Step 2: Upload Logo**
Click the 'Browse' button to locate the logo file, and then click Upload to upload the file.

Note: Logo files must be:
- Maximum width of 300 pixels.
- GIF or JPEG format.
- Sufficient resolution and quality for printing.